

The Food Frontier consumer survey 2024

Understanding dietary preferences and changes in Australia



food
frontier

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Food Frontier acknowledges the Traditional Owners of the land on which we work, the Wurundjeri people of the Kulin nation. We pay our respects to Elders past and present.

Introduction

The 2024 Food Frontier consumer survey engaged Toluna to undertake a nationally representative survey of 2,000 respondents across Australia to explore their dietary preferences, including meat intake, dietary changes for themselves and their pets, and the reasons behind these changes. This survey builds on data from a similar nationally representative survey conducted by Toluna in 2021 with 1,000 respondents, providing comparative insights where available.

The survey looked at meat consumption trends, diet types and influencers, protein alternatives, climate change attitudes and pet diets.

Meat reducer emerged as the most popular diet in 2024, followed by intermittent fasting and organic diets. Flexitarian, meat reducer, vegan, and vegetarian diets are popular with a total of 43% of Australians reducing their meat intake or eating none. Health is the top motivator for these diets, followed by environmental and medical reasons. Australians learn about diets primarily from friends and family, health professionals and influencers also play key roles.

In 2024, 25% of Australians reduced their meat intake, consistent with 2021 figures, while 2% eliminated meat entirely. However, 51% maintained their current meat consumption, down from 56% in 2021. Health remains the primary motivation for reducing meat consumption, with a notable increase in budget and environmental concerns. Additionally, 79% of Australians go meat-free at least one day a week, slightly down from 80% in 2021.

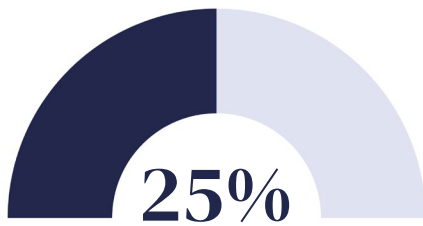
Plant-based milks are the most tried and regularly consumed products amongst a list of alternative and free-from food and drinks, with 41% of respondents having tried them. Plant-based meats are also popular, driven by health benefits, taste, and environmental concerns. Convenience and familiarity are key factors for choosing plant-based meats over other proteins.

Air pollution, greenhouse gas emissions, and fossil fuels are viewed as the top contributors to climate change. Australians are taking actions such as recycling, reducing vehicle use, and adopting renewable energy to mitigate their climate impact. Dietary changes are also notable, with 22% of Australians reducing or eliminating animal meat to address climate change.

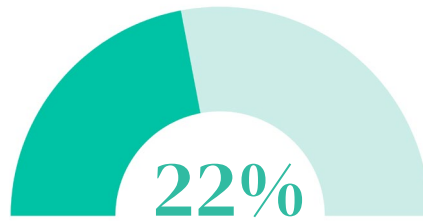
Nearly half of pet owners are willing to change their pets' diets for health, ethical, or environmental reasons. There is a growing preference for ethically sourced and sustainable pet food options, with significant interest in minimal or no animal meat products.

All graphs shown are for 2024 unless otherwise stated. Meat refers to animal meat unless otherwise specified. When referring to plant-based meats this report refers to them as such.

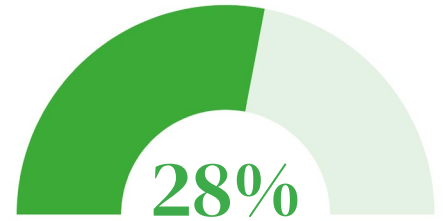
Snapshot



of Australians have reduced their meat intake, with a further 12% planning to reduce their meat consumption.



Due to climate change concerns, 22% of Australians are reducing or cutting back on meat.



of people buy both plant-based meats as well as other plant proteins like tofu and lentils, depending on the meal they are preparing.

38%

would opt for wet pet food with no animal products, provided it was nutritionally adequate.

44%

of Australians think animal agriculture contributes to climate change.

41%

of Australians have tried plant-based milks.

35%

of Australians have tried plant-based meats, up from 24% in 2021.

79%

of Australians are going meat-free at least one day a week, with some abstaining from meat entirely.

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Of those who own a cat or a dog, almost half would consider changing their dog or cat's diet to address health, ethical or environmental issues.



Types of diets and influences

Popularity of diet types

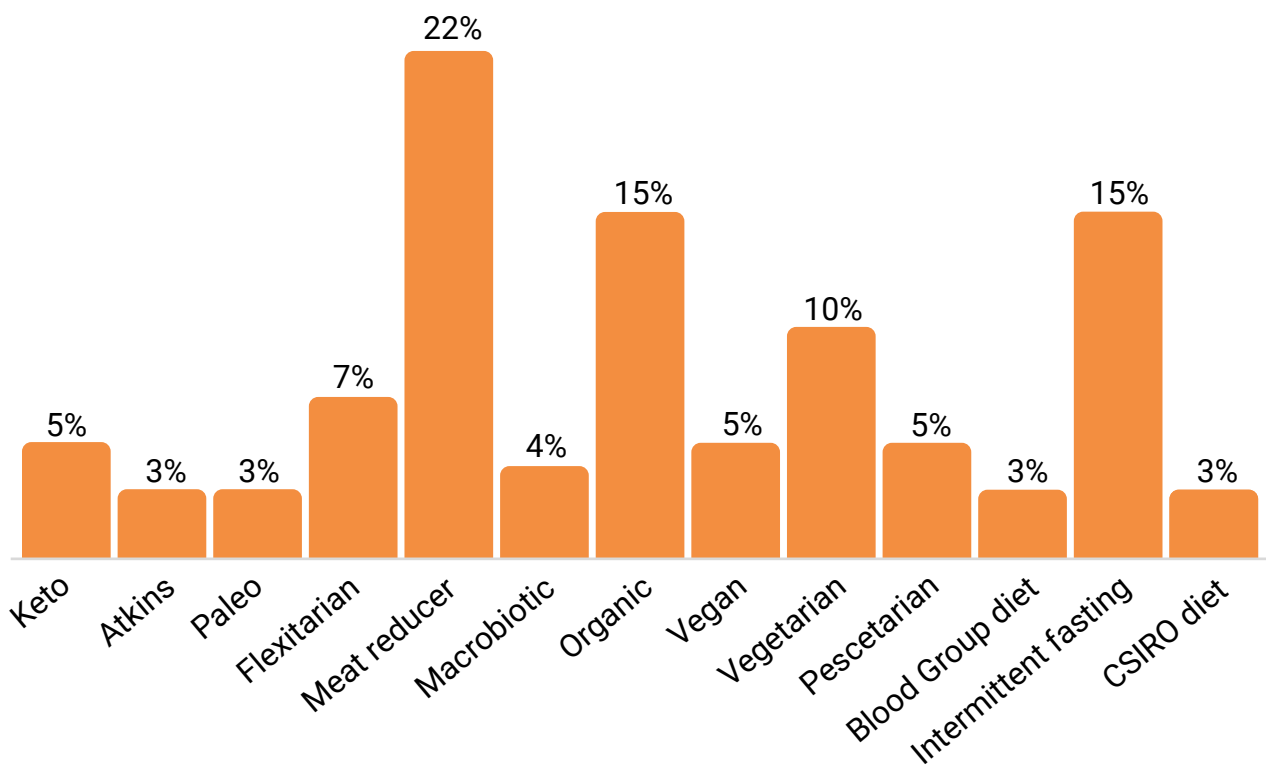
Australians have explored, are exploring, or plan to explore a wide range of diets.

Meat reducer is the most popular diet in 2024, followed by intermittent fasting and organic. Meat reducer was introduced as a new category in the 2024 survey, to include those who are reducing their meat consumption but may not consider themselves to be a flexitarian. In 2021, organic diets were the most popular, followed by intermittent fasting and vegetarian diets.

The number of respondents who identified as flexitarian reduced from 10% in 2021 to 7% in 2024 (although the addition of a meat reducer category is likely to have influenced the responses) while those identifying as vegan/vegetarian remained the same in 2021 and 2024 at 15% in total.



Proportion of Australians currently trying different diets - 2024

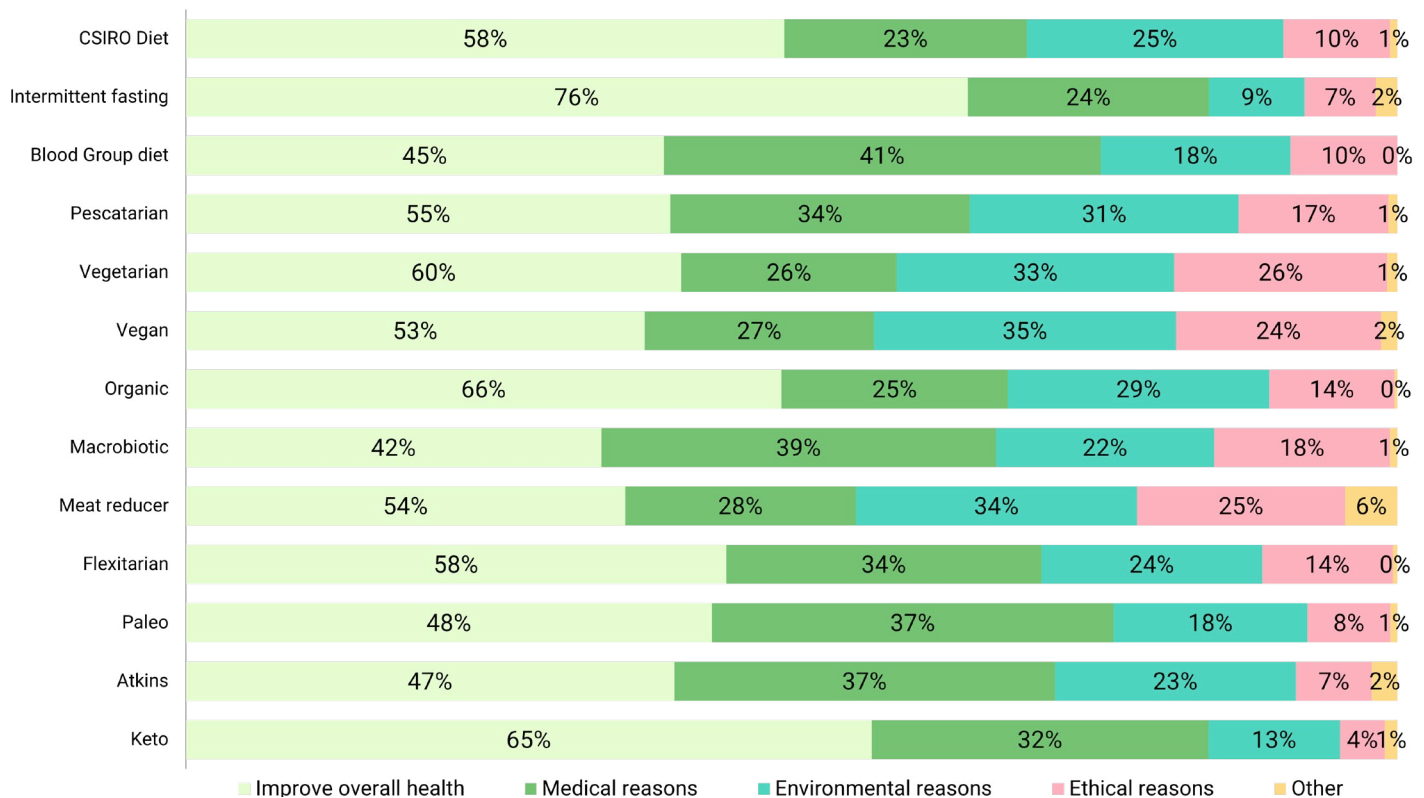


Proportion of Australians currently trying the above diets.

Dietary motivators

Participants who indicated they were following a certain diet type were asked about their motivations for doing so. Health is the main motivator across all types. For most diets, medical reasons were provided as the second most common reason (to address a diagnosed medical condition such as diabetes or high cholesterol), except for meat reducer, organic, vegan, vegetarian, and CSIRO diets, where environmental concerns ranked second. The third most common reason given for trying the diets, for eight of the 13 types, was environmental reasons.

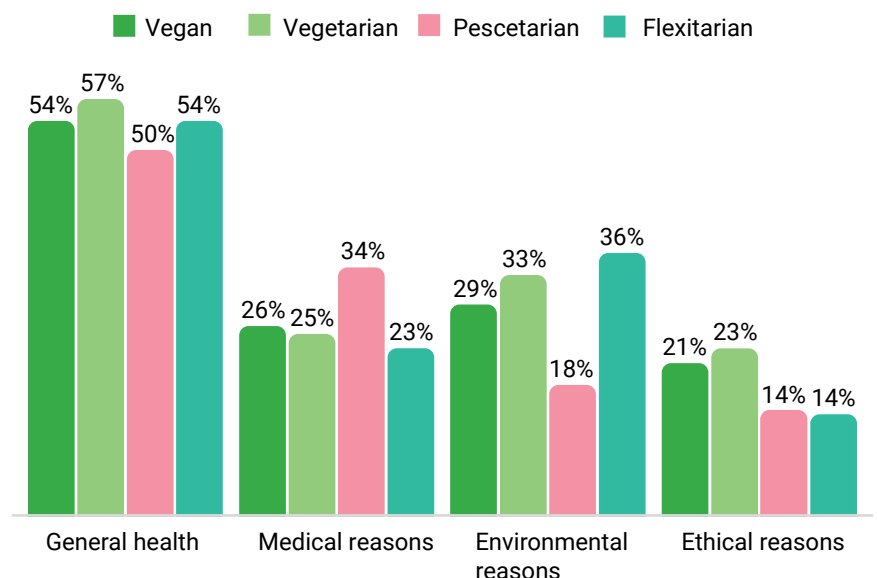
Dietary motivators - 2024



Q) Why have you tried the following diets? n=545.

Dietary motivators - 2021

The 2024 dietary motivators can be compared to 2021 and for relevance, only those following diet types most interested in alternative proteins are displayed to the right. Meat reducer was not an option in the 2021 survey. Motivations have remained similar over the past four years. Health reasons are still the main driver across all four diets, followed by environmental reasons except for flexitarians who cited medical reasons as their second primary motivator in 2024, replacing environmental reasons as their second motivator in 2021.



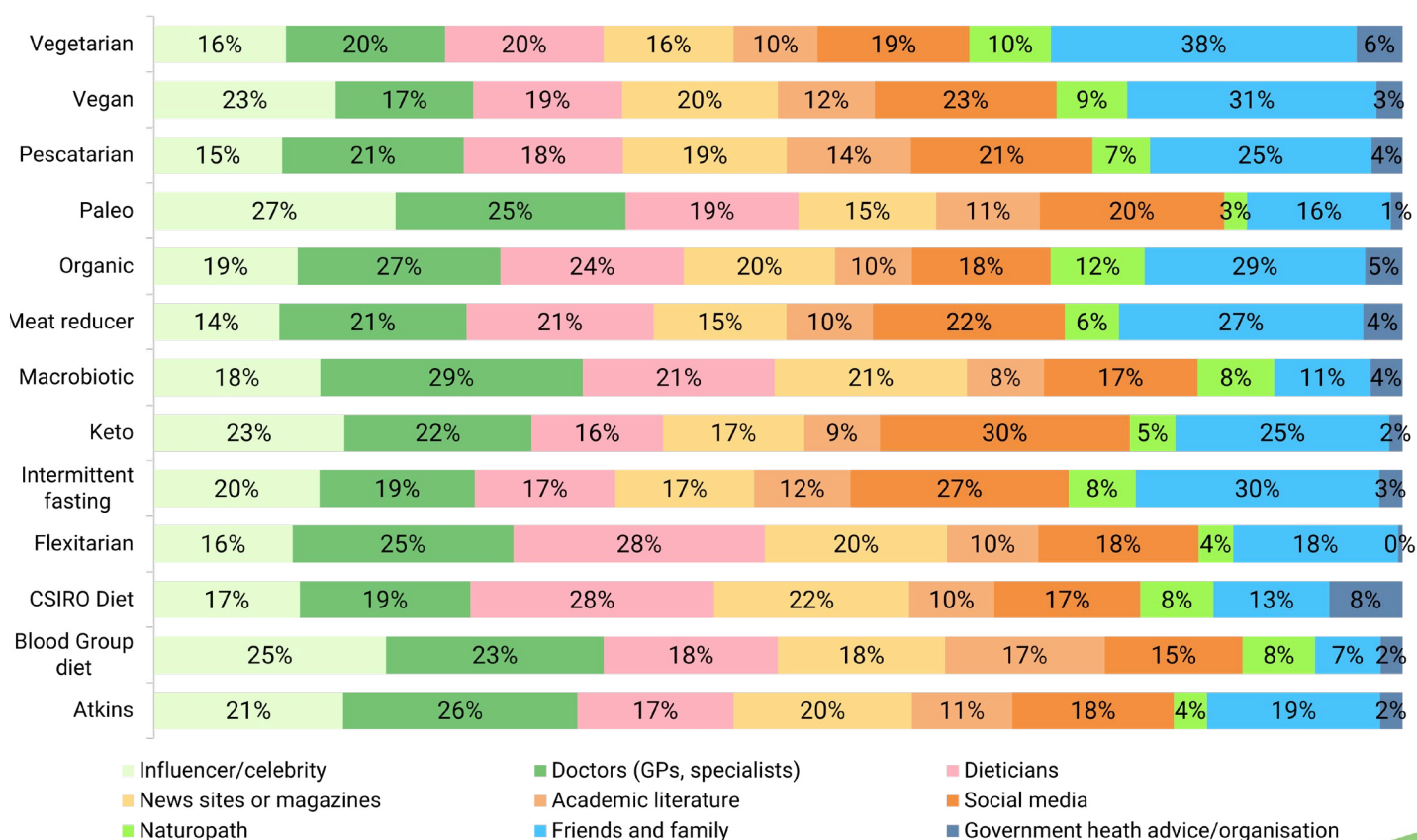
Q) Why have you tried the following diets? n=486.

How Australians hear about diet types

Australians turn to a wide range of sources for information on diets. Friends and family are the most common source of information for those interested in the top three most popular diets: meat reducer (27%), intermittent fasting (30%), and organic (29%). Vegans and vegetarians are also most likely to learn about these diets from friends and family. In fact, friends and family have the greatest influence on vegetarians (38%) compared to any other dietary group.

Those who have tried or are following a flexitarian and macrobiotic diet are more likely to hear about them from health professionals such as doctors and GPs. Like 2021, Australians interested in blood group and paleo diets are most likely to have heard about them from influencers and celebrities.

Sources of information for diet types - 2024

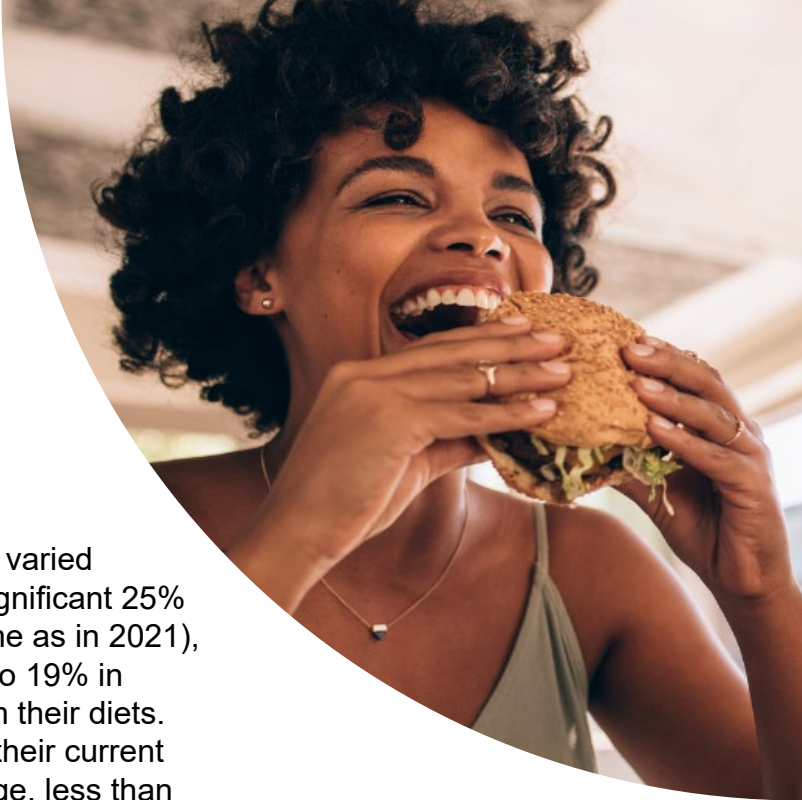


Q) Where did you hear about these diet types? Select all that apply. n=584.

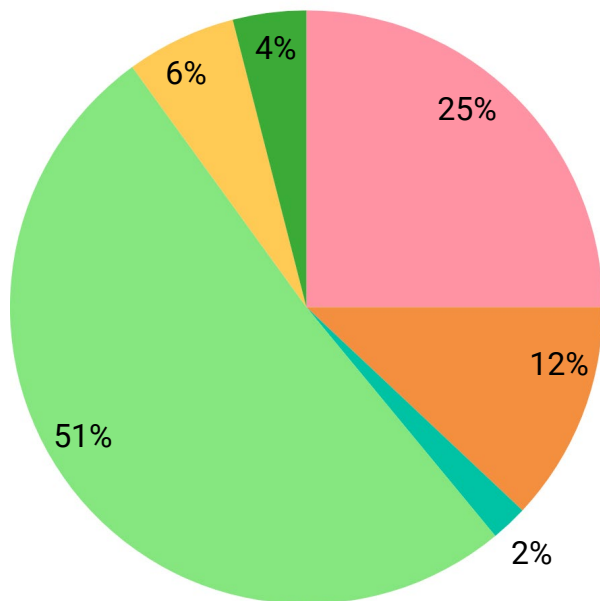
Meat consumption trends

Meat intake

In 2024, dietary trends among Australians reveal varied attitudes towards animal meat consumption. A significant 25% have reduced their meat intake (which is the same as in 2021), with a further 12% planning to do so, compared to 19% in 2021. Additionally, 2% have eliminated meat from their diets. However more than half, 51%, have maintained their current level of meat consumption without plans to change, less than 2021 when 56% reported that they're keeping their meat intake the same. In 2024 the survey asked consumers if they have or are planning to increase their meat consumption, 6% reported doing so and 4% intend to increase it.

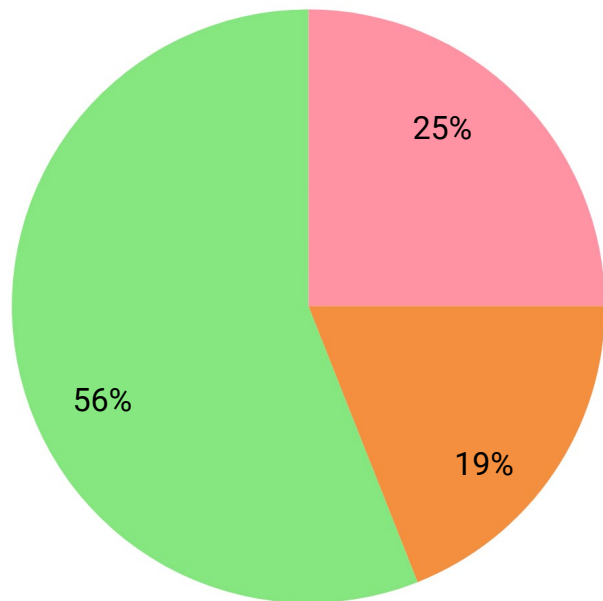


Australian meat consumption trends - 2024



- I have reduced my meat consumption
- I am planning to reduce my meat consumption
- I am eliminating meat
- My meat consumption has remained the same
- I have increased my meat consumption
- I am planning to increase my meat consumption

Australian meat consumption trends - 2021



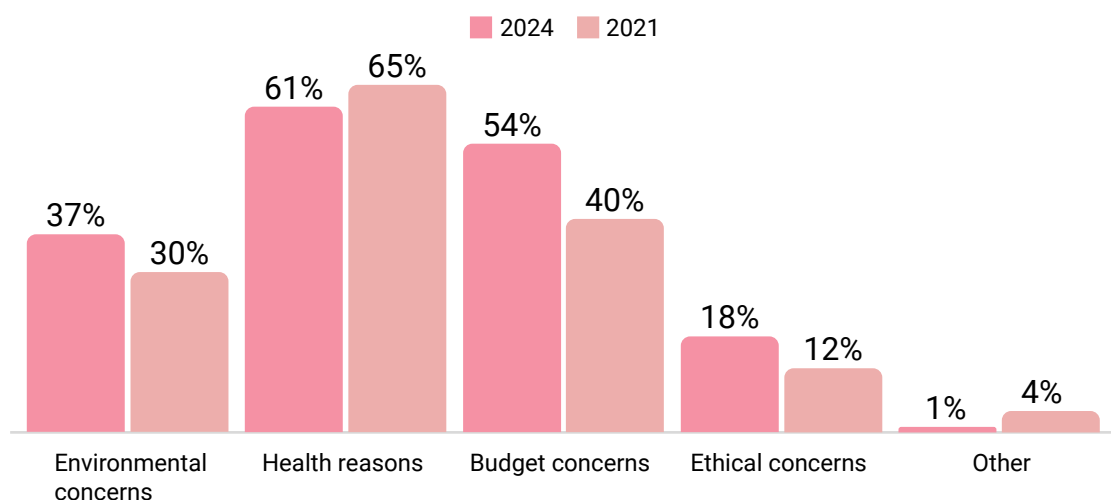
- I have reduced meat consumption
- I am planning on reducing meat consumption
- I am keeping meat consumption the same

Q) Select one statement which best describes your current meat consumption.

Motivations for reducing meat consumption

Those who have reduced their animal meat consumption or plan to do so were asked about their motivators. Health reasons remain the primary motivator for those who have reduced or plan to reduce their animal meat consumption, followed closely by budget considerations. Over the past four years, the importance of budget as a motivator has increased significantly, rising from 40% in 2021 to 54% in 2024, an indicator of the cost-of-living crisis being experienced at the time of the survey. Environmental concerns have also seen a slight increase, from 30% in 2021 to 37% in 2024. Ethical concerns have grown modestly, with 18% of participants citing them as a reason for reducing meat consumption, up from 11% four years ago.

Motivators to reduce meat consumption 2024 vs 2021

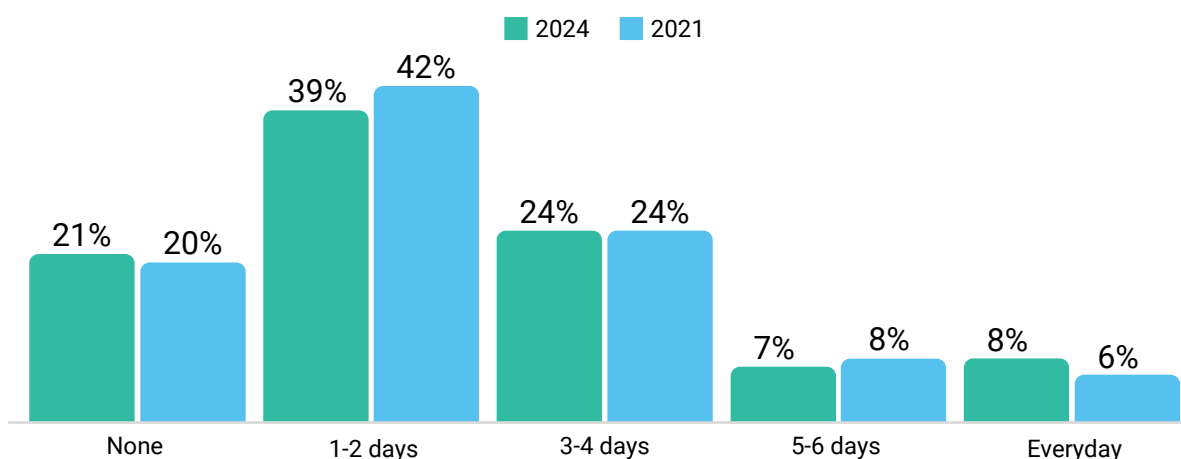


Q) Why have you, or are you planning to, reduce your meat consumption? Select all that apply.

Frequency of meat-free days

Seventy-nine per cent of Australians are now going meat-free at least one day per week, with some abstaining from meat entirely. This is a slight decrease from 80% in 2021. In 2021, 42% of consumers reported abstaining from meat 1-2 days a week, compared to 39% in 2024. Additionally, 8% are going without meat every day, up from 6% in 2021.

Meat-free days per week 2024 vs 2021



Q) How many days per week do you eat meat free?

Food and drink alternatives

This section explores various plant-based and free-from foods and drinks, with a particular focus on understanding attitudes towards plant-based meats—one of the alternative proteins that is focused on by Food Frontier.

Most tried plant-based and free-from foods

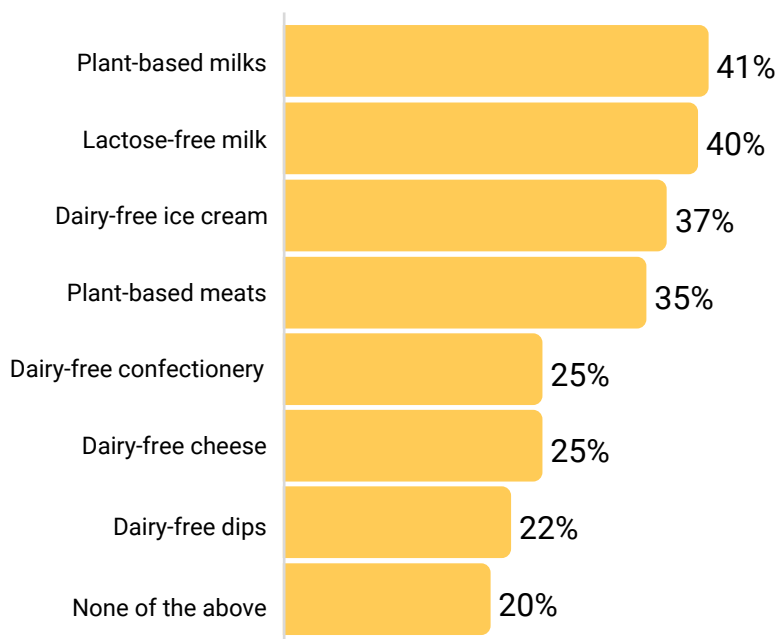
Australians have access to a wide range of plant-based and free-from food and drinks. When asked which products they have tried, 41% of respondents reported trying plant-based milks, making it the most popular choice. Close behind, 40% have tried lactose-free milk, and 37% have sampled dairy-free ice cream. Thirty-five per cent have tried plant-based meats, while 25% have explored dairy-free confectionery. Dairy-free cheese has been tried by 25%, and 22% have sampled dairy-free dips. Nonetheless, 20% of respondents indicated they have not tried any of these alternatives.

The question about alternative food and drinks in 2024 varied slightly to the 2021 survey, which limits the comparative data that can be shown. However, in 2021, 25% of respondents had tried plant-based meats.

Regularity of consumption

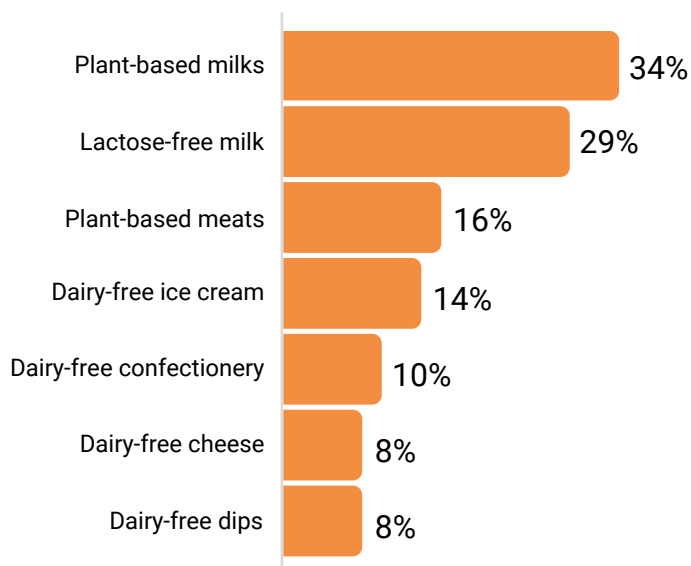
Respondents were asked how regularly they consumed the above range of foods and drinks, with 'regularly' defined as at least once per week. Plant-based milks are consumed regularly by the greatest number of respondents at 34%. Lactose-free milk follows closely, with 29% and plant-based meats are regularly consumed by 16% of Australians. Dairy-free ice cream is regularly eaten by 14% of those surveyed. Other dairy-free alternatives are also being consumed regularly. Dairy-free cheese is consumed at least once a week by 8%, and dairy-free dips by 8%.

Alternative products tried



Q) Which of the following have you ever tried? Select all that apply.

Alternative products consumed regularly - 2024



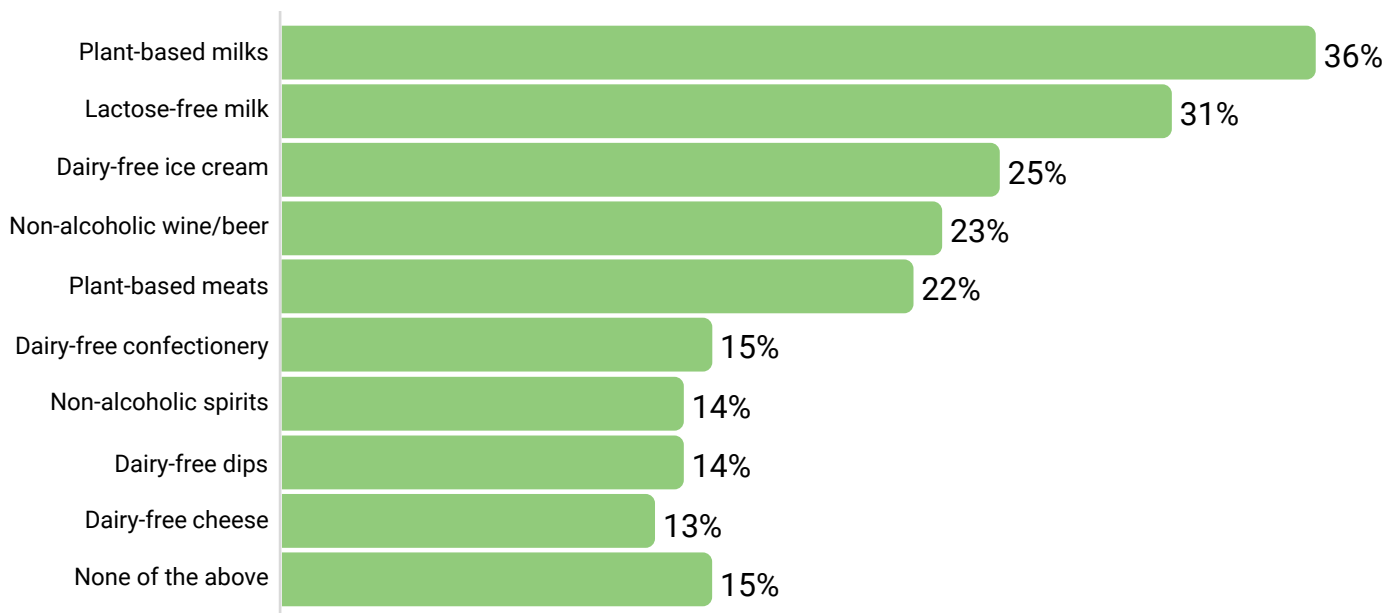
Q) Which of the following do you eat/drink regularly (at least once a week)? n=1,675.

Most likely to repurchase

Survey participants shared their preferences for which of the above food and drinks they would purchase again. The most selected response was plant-based milks, with 36% of respondents expressing a likelihood to buy it again. Lactose-free milk followed, with 31% of participants indicating they would repurchase it. Dairy-free ice cream was selected by 25% of respondents and plant-based meats were selected by 22% of participants.

Other items had lower repeat purchase rates, with 15% indicating they would buy dairy-free confectionery again, 14% considering dairy-free dips, and 13% choosing dairy-free cheese.

What products Australians would buy again



Q) Which of the following would you buy again? n=1,675.

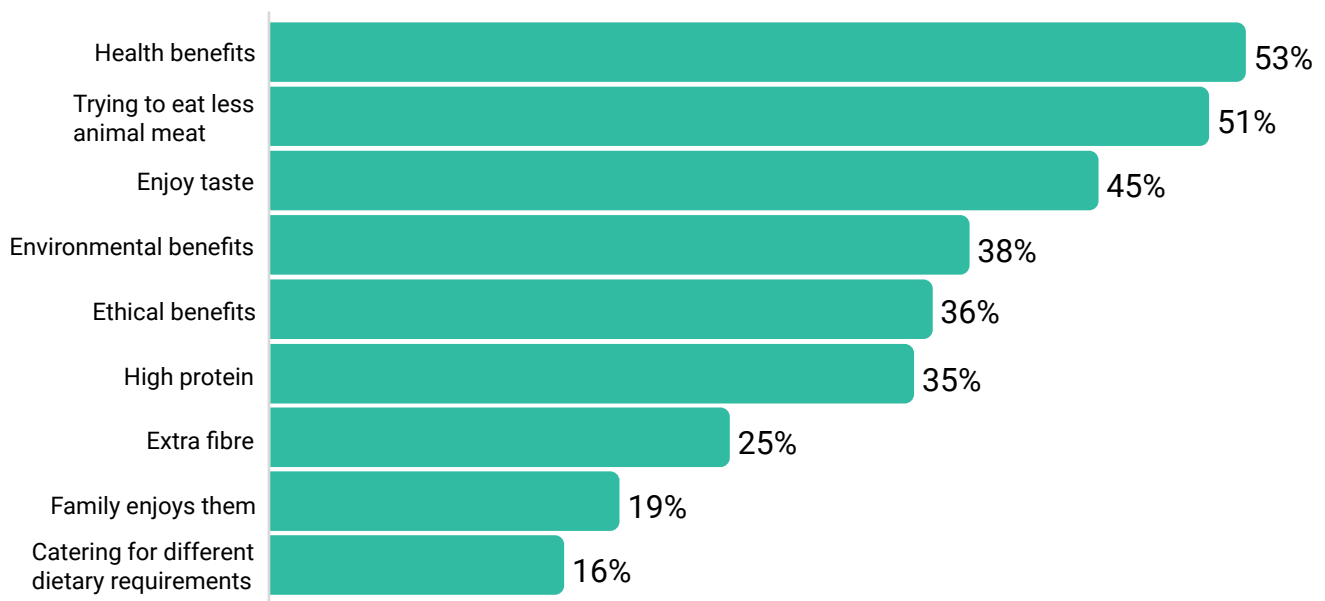


Why consumers buy plant-based meats

The survey asked those who had purchased plant-based meats before about the reasons that motivated their purchase. More than half (53%) selected health benefits, followed by 51% who wanted to reduce their consumption of animal meat. Taste was also a significant factor, with 45% of respondents indicating they like the flavour of plant-based meats. Environmental benefits were noted by 38%, while 36% cited ethical benefits as a reason for their choice.

Additional reasons included high protein content, mentioned by 35%, and extra fibre, noted by 25% of respondents. Family enjoyment influenced 19% of participants, and catering to different dietary requirements among family and friends was a consideration for 16%.

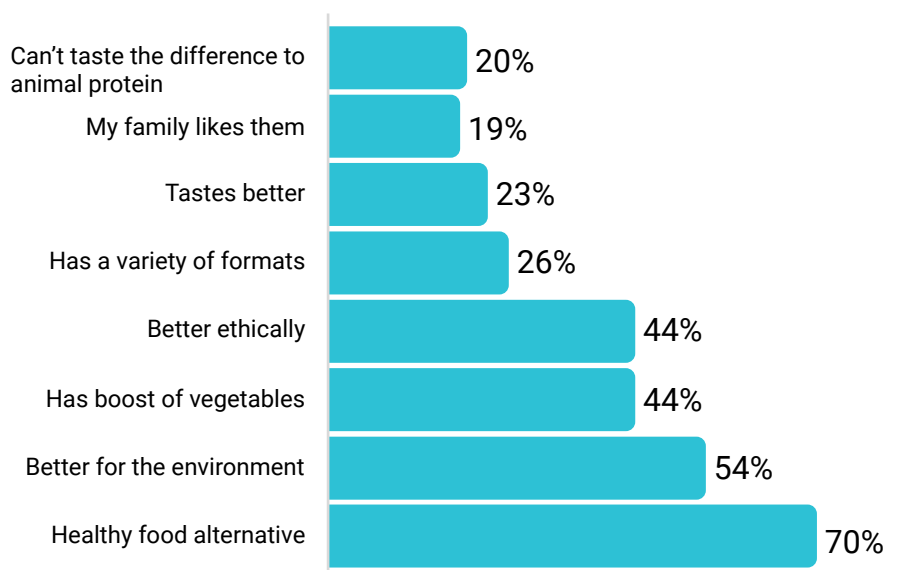
Purchase motivators for plant-based meats - 2024



Q) Why do you buy plant-based meats? Select all that apply. n=372.

Why plant-based meats are liked - 2021

The 2024 survey added new optional responses to the question about why respondents buy plant-based meats, aiming to provide more detailed insights than the 2021 survey. The 2021 survey, results to the right, also asked a slightly different question to 2024: Why do you like plant-based meats? Health was the most common reason provided, followed by environmental and ethical considerations.



Q) Why do you like plant-based meats? n=167. Total sample size 1,000.

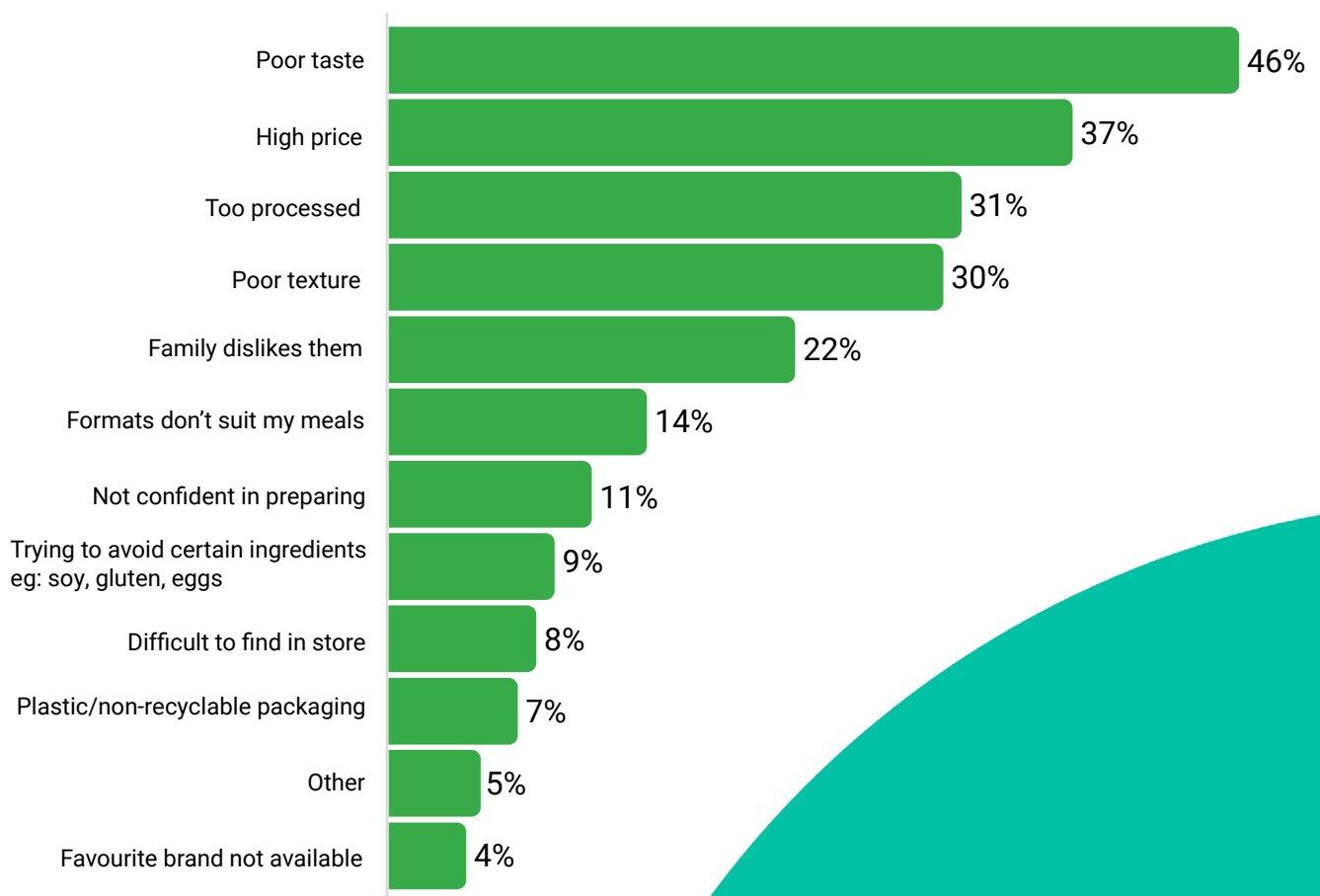
Why consumers avoid repurchasing plant-based meat

The survey asked those who would not buy plant-based meat again to select their reasons against repurchase. Taste and price are the two most significant barriers. According to the survey, 46% find the poor taste of these products to be a barrier, while 37% cite high prices as a barrier.

Another notable issue is the perception that plant-based products are too processed, affecting 31%. Texture problems also contribute to dissatisfaction, impacting 30%. Additionally, 22% of people mentioned that family members' dislike for these products influences their purchasing decisions. Format compatibility is another challenge, with 14% finding that the product formats do not suit their meals. A lack of confidence in preparing these foods is also a factor for 11% and 9% are trying to avoid specific ingredients such as soy, gluten, or eggs, which limits their options.

Availability issues are evident as well, with 8% struggling to find plant-based meats in stores. Concerns about plastic or non-recyclable packaging affect 7% and 4% cited their favourite brand not being available as an obstacle.

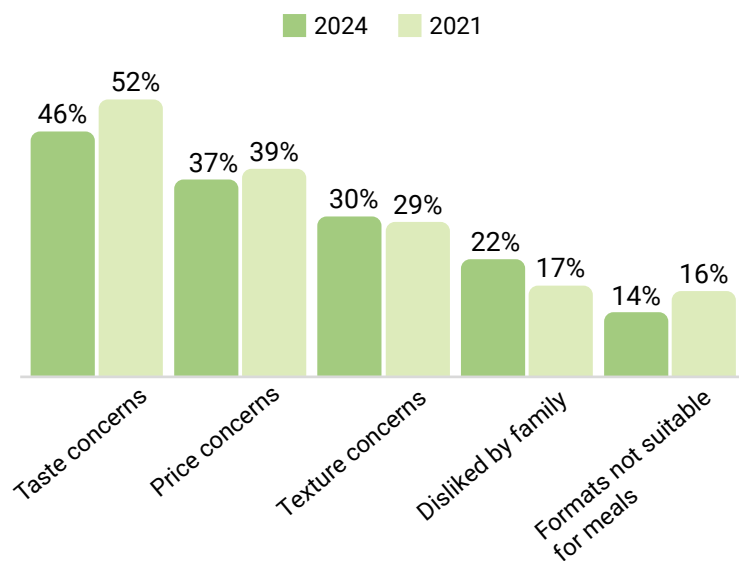
Barriers to repeat consumption of plant-based meats - 2024



Q) Why would you not try plant-based meats again? Select all that apply. n=1,303.

To understand more about consumer barriers to purchasing plant-based meats, extra options could be selected in the 2024 survey, therefore some responses provided in 2024 aren't comparable to 2021. The graph to the right shows the comparable responses in the 2024 and 2021 studies. The percentage of respondents who found the taste of plant-based meats unappealing was down from 52% in 2021 to 46% in 2024. Those who felt the types of food formats didn't work with their meal plans decreased slightly from 16% in 2021 to 14% in 2024. Cost concerns decreased slightly from 39% in 2021 to 37% in 2024. However, the percentage of respondents whose families disliked plant-based meats increased from 17% in 2021 to 22% in 2024.

Comparison of barriers to repeat consumption 2024 vs 2021

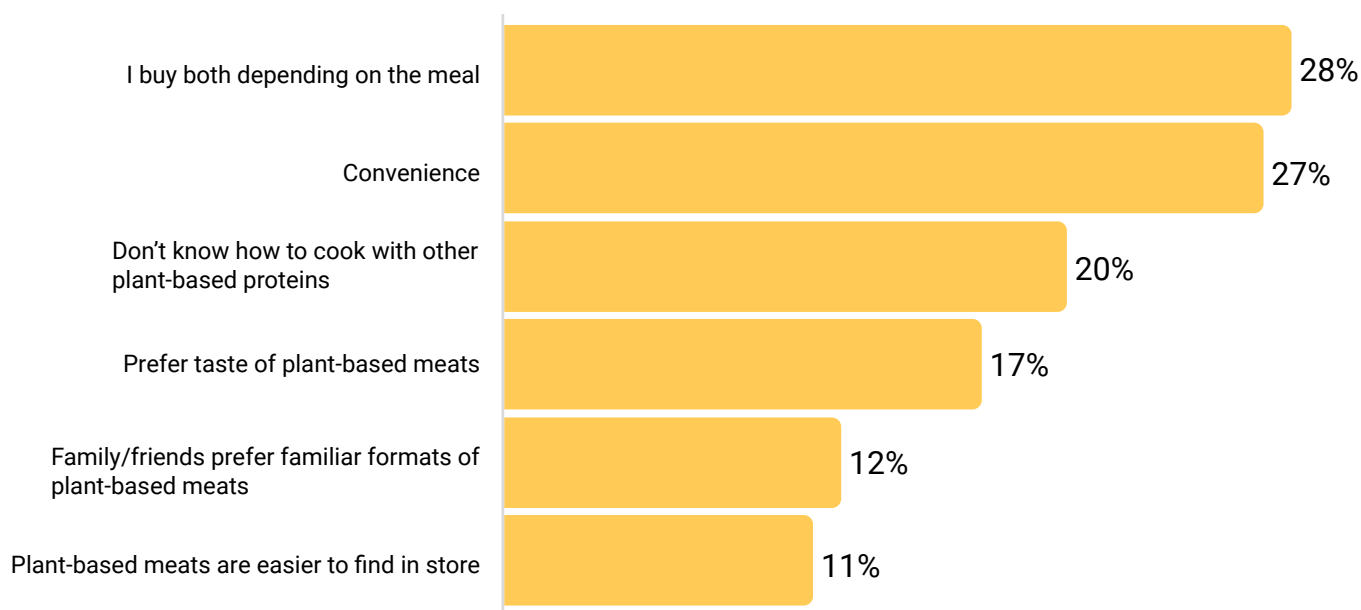


Barriers to repeat consumption of plant-based meats. Comparable responses from 2024 and 2021 only.

The appeal of plant-based meats over other proteins

In 2024 the survey asked respondents why they would choose plant-based meats over other types of plant proteins such as tofu and lentils. Twenty-eight per cent said they buy both types depending on the meal. Convenience was the next most popular reason, with 27% of respondents finding plant-based meats more convenient. Twenty per cent said they don't know how to cook with other plant-based proteins, while 17% prefer the taste of plant-based meats. Family and friends' preference for familiar formats of plant-based meats influenced 12% of respondents, and 11% found plant-based meats easier to find in stores.

Why Australians choose plant-based meats over other plant proteins - 2024



Q) Why would you choose plant-based meat over other plant-based proteins, such as tofu or lentils? Select all that apply.

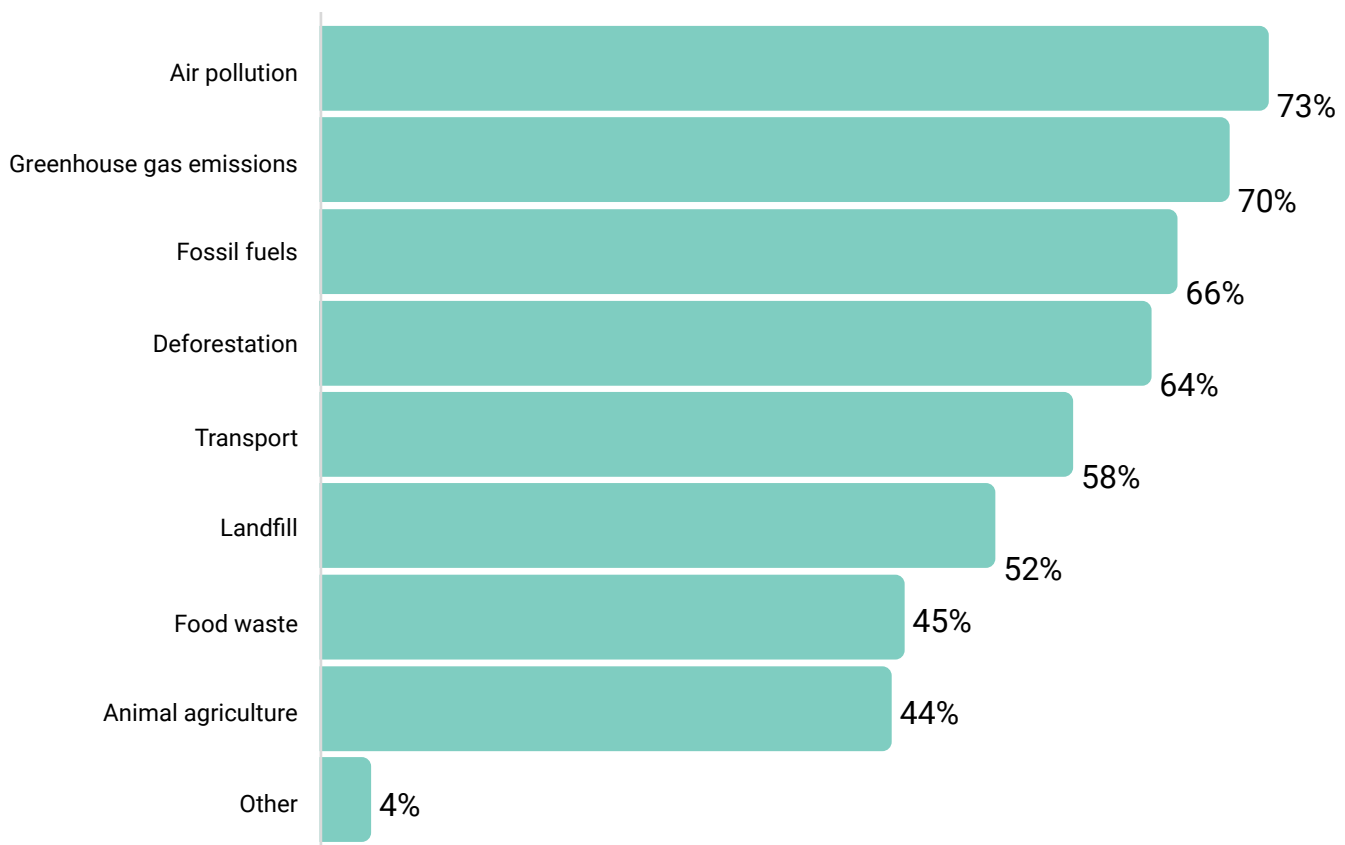
Climate change contributors and actions

In 2024 Food Frontier wanted to know what Australians understand about climate change contributors and if climate change considerations are influencing their dietary choices.

Perceived causes of climate change

The survey asked respondents to identify from a list the things they thought contributed to climate change. Air pollution topped the list, with 73% of participants selecting it as an impact. Close behind, 70% of respondents acknowledged the role of greenhouse gas emissions. Fossil fuels were identified by 66% of those surveyed, while 64% selected deforestation. Transport was considered a contributor by 58%, and landfill by 52% of respondents. Food waste was identified by 45% of participants. Animal agriculture was the least identified contributor with only 44% of respondents making a connection between animal agriculture and climate change.

Contributors to climate change - 2024

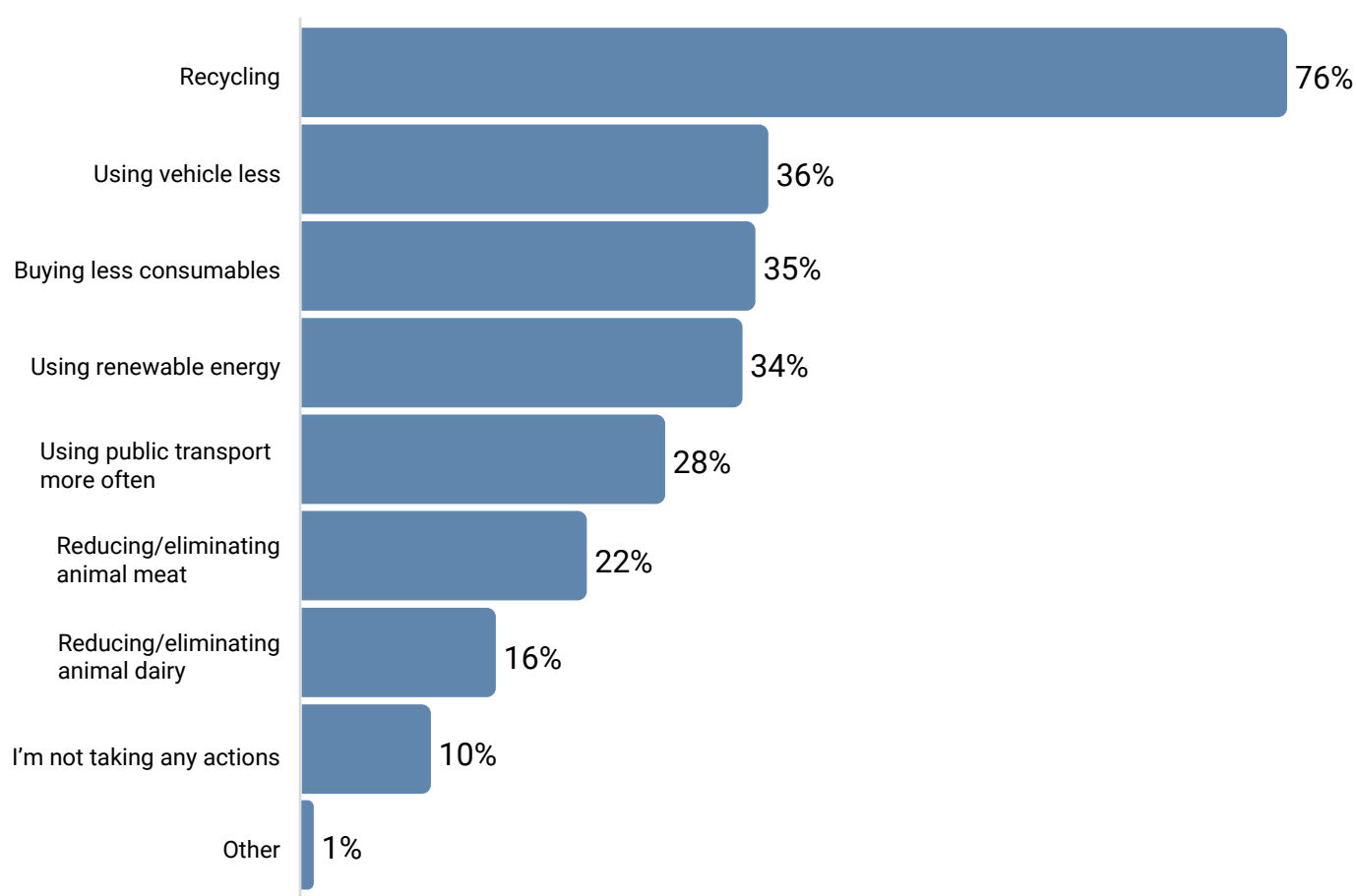


Q) Which of the following do you think contributes to climate change? Select all that apply.

What Australians are doing about climate change

Asked to select from a list any actions they are taking to reduce their impact on climate change the most common response was recycling, with 76% of respondents engaging in this practice. Thirty-six per cent are using their vehicles less, while 35% are buying fewer consumables. A significant number of participants, 34%, are using renewable energy sources, and 28% are using public transport more often. Dietary changes are also prevalent, with 22% reducing or eliminating animal meat and 16% reducing or eliminating animal dairy. Ten per cent of respondents said they are not taking any actions to reduce their impact on climate change.

Actions taken to address climate change - 2024



Q) Are you taking any of the following actions to reduce your impact on climate change? Select all that apply.

Pet diets: health, ethics and climate change



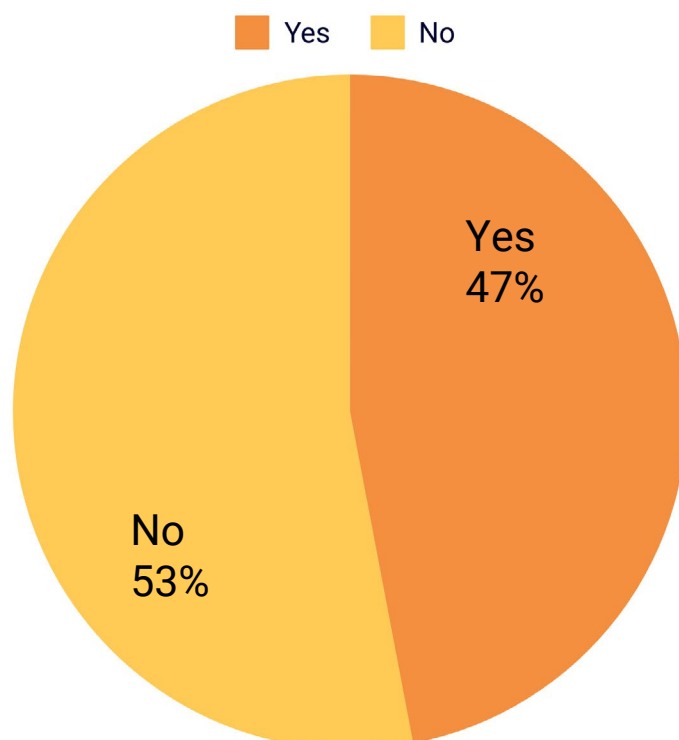
Willingness to change pets' diets

The consumption of animal protein by pets also has a significant climate impact. A Griffith University¹ study calculated that if all the world's domestic dogs and cats stopped eating animal products, it would save more greenhouse gases than those emitted by the UK and New Zealand combined and curb emissions from meat and dairy by 15%. A UCLA study² found pet food releases 64m tonnes of CO₂-equivalent greenhouse gases in the US. The issue is likely to be exacerbated with the pet food industry expecting the raw, fresh and gourmet pet food industry to increase substantially.

Therefore, in 2024 Food Frontier wanted to understand if Australians are willing to modify their pets' diets out of concern for health, ethics and/or climate change.

Of those who own a cat or a dog, almost half said they would consider changing their dog or cat's diet to address health, ethical or environmental issues.

Willingness to change pets' diets - 2024

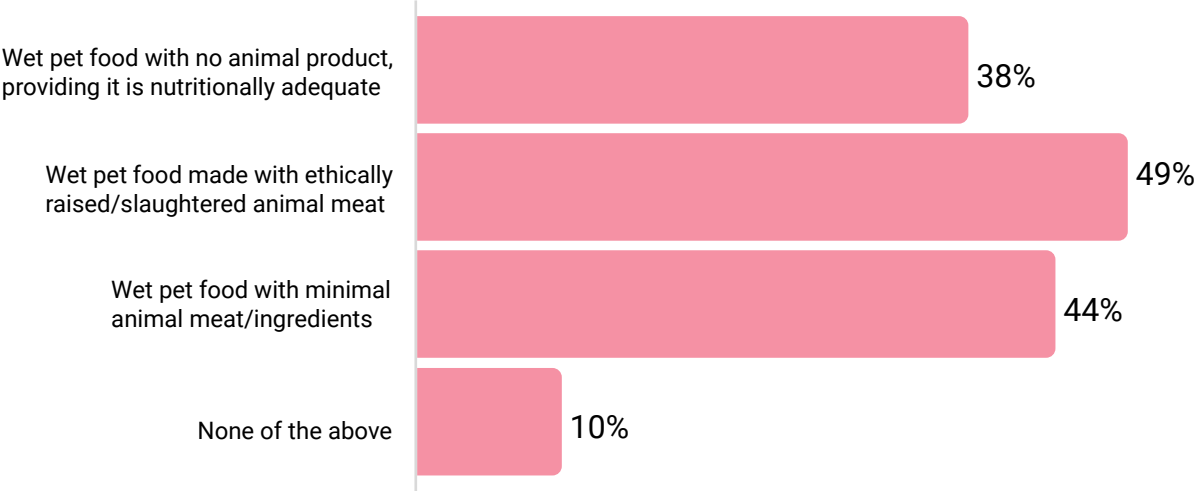


Q) Would you consider changing your dog or cat's diet to address health, ethical or environmental issues? n=1,378 (owns a cat or dog).

Preferences for ethical and sustainable wet pet food

Of those who would be willing to change their cat or dog’s diet to address health, ethical or environmental issues, distinct preferences appeared. When asked which types of wet pet food they would consider if available, almost half (49%) selected a preference for options made with ethically raised/slaughtered animal meat. A significant portion, 44%, expressed interest in wet pet food containing minimal animal meat or ingredients. Additionally, 38% of respondents would consider wet pet food with no animal products, provided it is nutritionally adequate. Ten per cent of those surveyed indicated that they would not purchase any of these options.

The types of pet foods Australians would buy



Q) Which of the following types of dog/cat wet food would you consider if available? n=647.

About the survey

The 2024 Food Frontier consumer survey engaged Toluna to undertake a nationally representative survey of 2,000 adult respondents (51% women, 49% men) across Australia to explore their dietary preferences. This survey builds on data from a similar nationally representative survey conducted by Toluna in 2021 with 1,000 adult respondents (53% women, 47% men). Total study sample size is 2,000. Not all questions were applicable to each participant; n number (n=) is shown for questions where the full sample size is lower than the study total. Where possible, comparative insights have been provided.

References

1. Knight A (2023) The relative benefits for environmental sustainability of vegan diets for dogs, cats and people. PLoS ONE 18(10): e0291791. <https://doi.org/10.1371/journal.pone.0291791>.
2. Okin GS (2017) Environmental impacts of food consumption by dogs and cats. PLoS ONE 12(8): e0181301. <https://journals.plos.org/plosone/article?id=10.1371/journal.pone.0181301>.



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